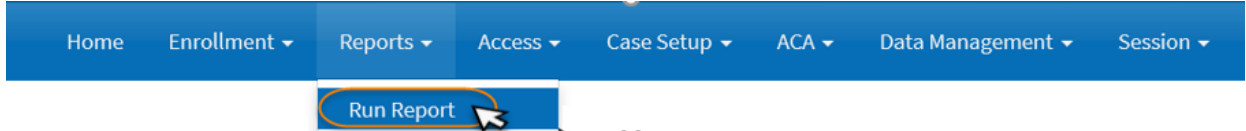


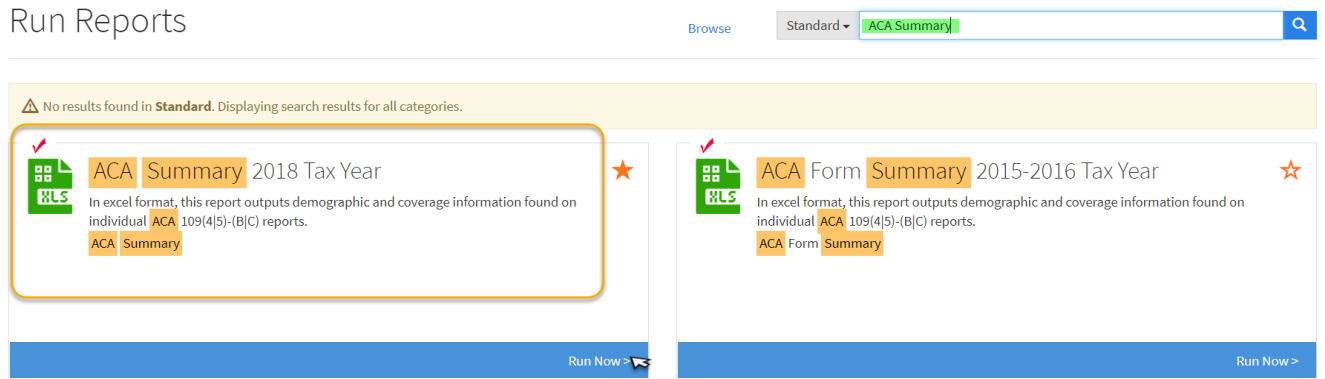


# Step Running & Scheduling the ACA Summary report

1. From the Admin site, hover over Reports and click **Run report**.



In the Search box, type **ACA Summary** and click the **Search Icon**. Click **Run Now** under the **ACA Summary 2018 Tax Year**.



2. **2018 Enhanced Feature:** The ACA Summary Report “Run” screen contains 7 tabs that explain the various report parameters and information used to generate the report.

Clicking each tab will display information pertaining to that report component.

## ACA Summary 2018 Tax Year



This report outputs demographic and coverage information found on individual ACA 109(4)5)-(B)C reports. It requires the purchase and installation of the ACA plugin. To purchase this plugin, contact [sales@selerix.com](mailto:sales@selerix.com). Be advised, Selerix does not offer any consultative advice about which parameters to select.

Report Parameters	Authoritative Transmi	Certifications of Eligiti	Aggregated ALE	Affordability Method	Special Situations	Multiemployer Interin
<p>ALE = Applicable Large Employer</p> <ul style="list-style-type: none"><li>• Authoritative Transmittal</li><li>• Certifications of Eligibility</li><li>• Aggregated ALE</li><li>• Affordability Method</li><li>• Special Situations</li><li>• Use Multiemployer Interim Rule</li></ul> <p><i>As a disclaimer, we (Selerix) can only offer our understanding of the IRS guidance and expectation as it relates to these parameters along with how our system is structured to accommodate that understanding through its functionality and reporting. We always advise employers to seek guidance from their advisor and/or legal counsel for any final determinations.</i></p>						

3. You will need to enter **General Parameters** for the report.

## General Parameters

<b>Employee:</b>	<All Employees>
<b>EIN:</b>	48-1159633
<b>Calendar Year:</b>	2018
<b>Mark Form As:</b>	<input type="checkbox"/> Add only employees that need correction

- **Employee:** ACA Summary reports are typically run for all employees; however, employers can run the report for individual employees if needed.
- **EIN:** ACA Summary reports are generated by unique EIN. Use the dropdown to select the applicable EIN, if multiple
- **Calendar Year:** ACA Summary report will default to 2018, but in subsequent years, use the dropdown to select the applicable reporting year.
- **Mark Form As:** ACA Summary report can be generated to add only employees that need correction. These individuals are identified by the “corrected” indicator used on the 1095-C Form.

4. **2018 Enhanced Feature: Affordability Method & Special Situations**  
Continue with **General Parameters** for the ACA Summary report using the ACA configurations/parameters provided by the employer.

<u>Authoritative Transmittal:</u>	<input type="checkbox"/> Is this the authoritative transmittal for this ALE Member?
<u>Certifications of Eligibility:</u>	<input type="checkbox"/> Qualifying Offer Method <input type="checkbox"/> 98% Offer Method
<u>Aggregated ALE:</u>	<input type="checkbox"/> Is ALE Member a member of an Aggregated ALE Group?
<u>Affordability Method:</u>	<input type="checkbox"/> Poverty Line <input type="checkbox"/> Rate of Pay Based on Pay History <input type="checkbox"/> Rate of Pay Based on Annual Salary <input type="checkbox"/> Rate of Pay Based on Hourly Wage <input type="checkbox"/> W2 Earnings
<u>Special Situations:</u>	<input type="checkbox"/> Include offers made to part time employees <input type="checkbox"/> Include 1094B and 1095B data
<u>Use MultiEmployer Interim Rule:</u>	<input type="checkbox"/> Apply code 2E where applicable

**Report Enhancement:**  
No longer set to default. YOU must SELECT the applicable option(s)

**Report Enhancement:**  
1094/1095B report tabs are suppressed unless "include" option selected

- **Authoritative Transmittal:** An employer may file multiple Forms 1094-C, one **Authoritative Transmittal** Form 1094-C, identified on line 19, Part II as the **Authoritative Transmittal**, must be filed for each employer reporting aggregate employer-level data for all full-time employees of the employer.
- **Certifications of Eligibility:** Select all that apply, if any.
- **Aggregated ALE:** An Aggregated ALE Group refers to a group of employers treated as a single employer under section 414(b), (c), (m) or (o).
- **Affordability Method:** An ALE may use one or more of the safe harbors as its option, but only if the ALE offers 95% of its full-time employees and their dependents the opportunity to enroll in coverage that provides minimum value for the self-only coverage offered to the employee.
  - Poverty Line
  - Rate of Pay Based on Pay History
  - Rate of Pay Based on Annual Salary
  - Rate of Pay Based on Hourly Wage
  - W2 Earnings (*For this method to calculate, a separate file must be provided with this information*)

- **Special Situations:** Parameter used to “include offers made to part-time employees”. This is an optional feature, employers do not have to report part-time employees who are offered benefits (outside of those who satisfy the average number of hours threshold based on the lookback measurement).
- **Use Multi-Employer Interim Rule:** An employer is treated as offering health coverage to an employee if the employer is required by a collective bargaining agreement or related participation agreement to make contributions for that employee to a multi-employer plan that offers, to individuals who satisfy the plan’s eligibility conditions, health coverage that is affordable and provides minimum value, and that also offers health coverage to those individual’s dependents. Use code 2E for any month for which the multi-employer arrangement interim guidance applies for that employee, regardless of whether any other code in Code Series 2 might apply.

5. **2018 Enhanced Feature: Task Description**

Set the **Delivery Options**

**Schedule Recurring Report** – Lets you schedule the report on a recurring basis.

Delivery Options

**Task Description:** [CASE] ACA Summary

**Deliverable:** <Not a Deliverable> +

**Delivery:**  Run Now  Deliver Report  Schedule Recurring Report

**From:** Kelli Smith, (kelli.smith@selerix.com, Selerix)

**To:** Choose Recipients → Select your recipient(s)  
Aaron Russell

6. Select **Delivery** as one of the following:

- **Run Now** – Displays the report in another window (or application such as Excel).
- **Deliver Report** – Lets you select report recipients.
- **Schedule Recurring Report** – Lets you schedule the report on a recurring basis. In the example below, this report is scheduled to generate the 1<sup>st</sup> Quarterly report and run subsequent reports for the next two quarters of the calendar year.

Date Range and Frequency

**Report Starts:** 01/01/2018

**End By:** 12/31/2018

**Frequency:**  Daily  Weekly  Monthly  Calendar

**Report Date(s):** 01/01/2018, 04/05/2018, 7/5/2018, 10/5/2018

- Click **Run Now**.

